8.51 Tools Upgrade
April 2012

SCore! 9.1

- Agenda
  - Introduction - Donalynn Black
  - 8.51 PT Presentation: March 20 - Tom Vaughan
  - 8.51 PT Presentation: March 22 - Tracey Hollins
  - PS 9.1 Overview - Donalynn Black

Upgrade Timeline

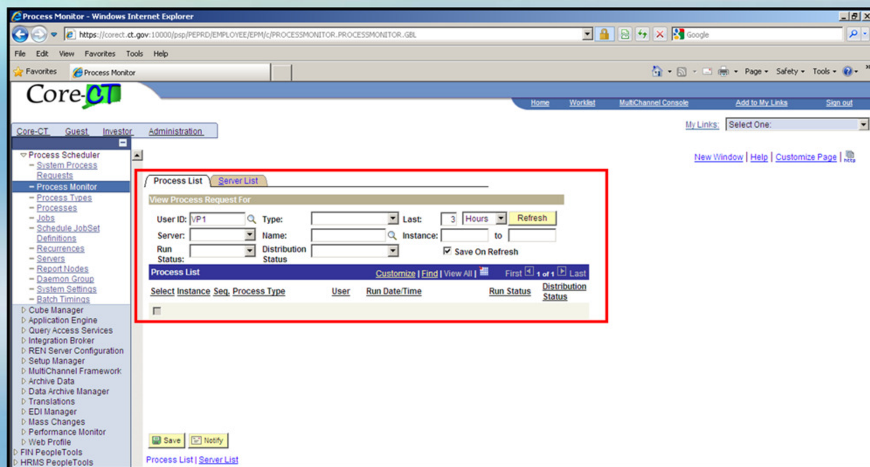
- Complete State and OSCIP pay cycle on Friday 3/30
- Financials will be going down after they are completed, approximately 2pm
- Financials will be going up on a limited basis on Monday morning for validation
- Financials will be released to all users after the validation is complete, approximately noon
- HRMS will have a completely different schedule.

The "notes" version of this presentation can be found at the Core-CT Home page under *9.1 Upgrade Project.*

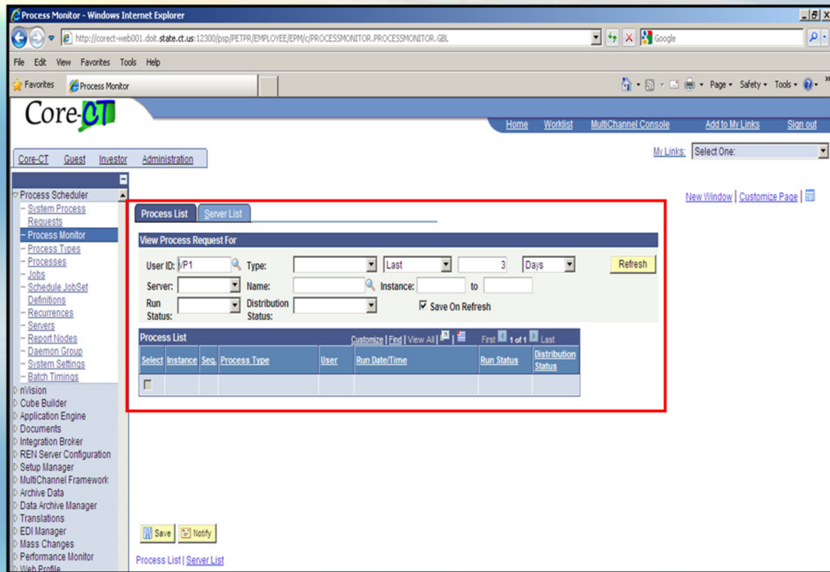
Upgrade from PeopleTools 8.49 to 8.51

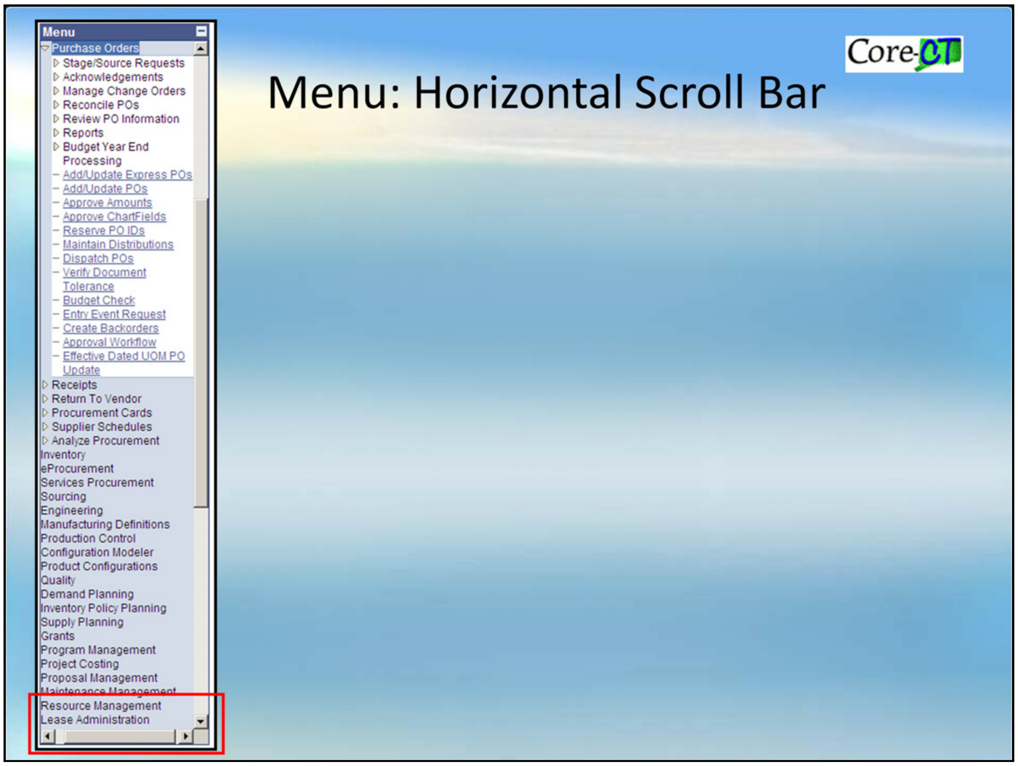
- To ready the underlying technology infrastructure to facilitate the application upgrades
- Minor "look and feel" changes
- April 2, 2012

Color Scheme: OLD

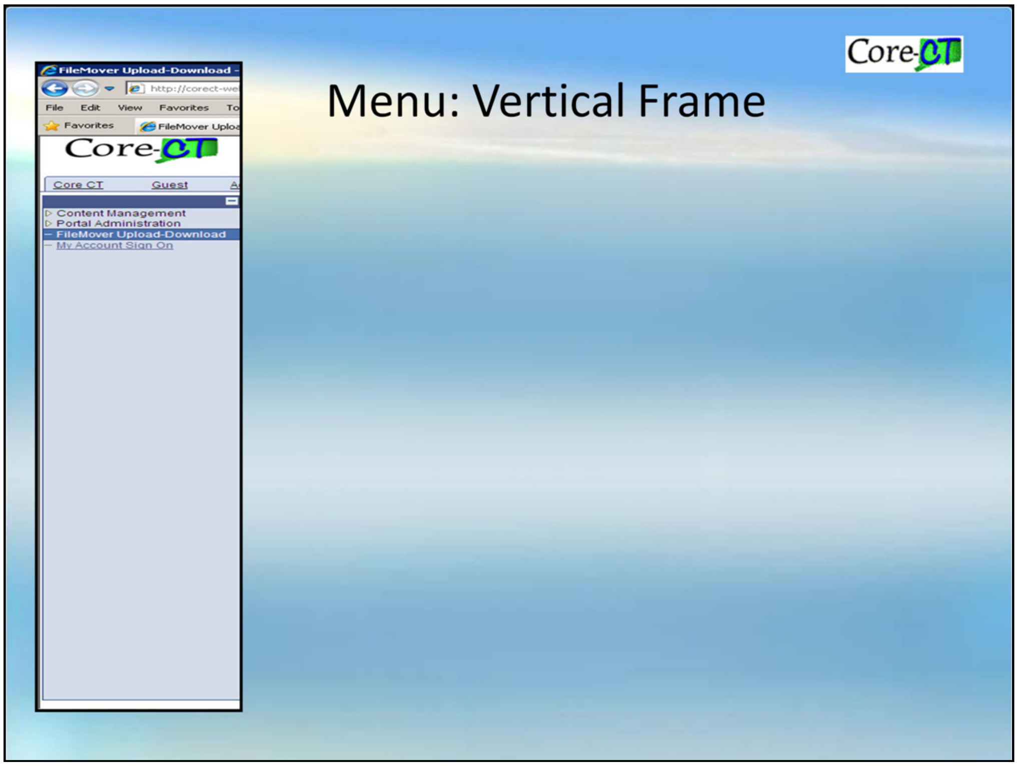


Color Scheme: NEW



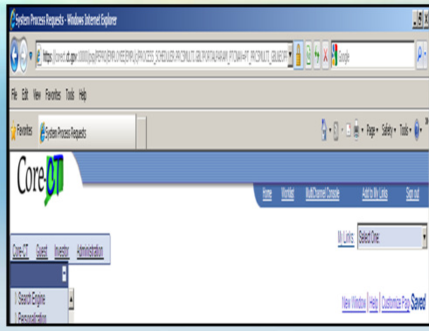


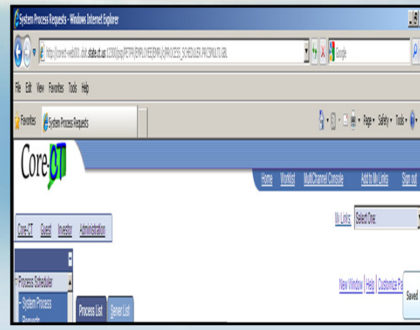
For certain users, when selecting items in the Enterprise Menu, the Menu will be shrunk horizontally and text will only be viewable by using the scroll bar at the bottom of the page.

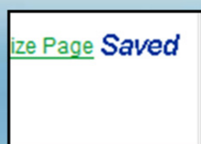


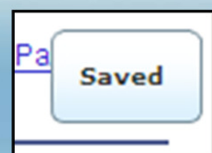
In the previous release users' security determined the number of menu items and the shaded frame that surrounded the Enterprise Menu. In the upgraded environment once the user clicks on an item in the Enterprise Menu the shaded frame expands the full vertical height of the page.

“Saved” Icon

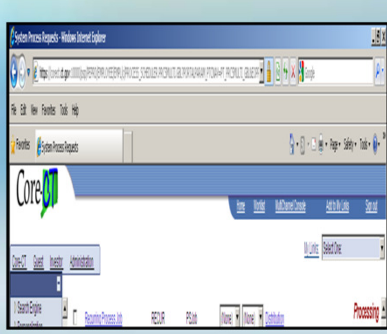


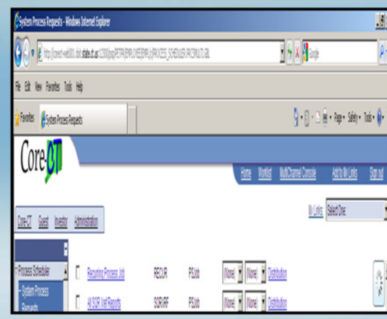


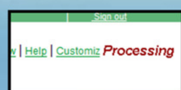


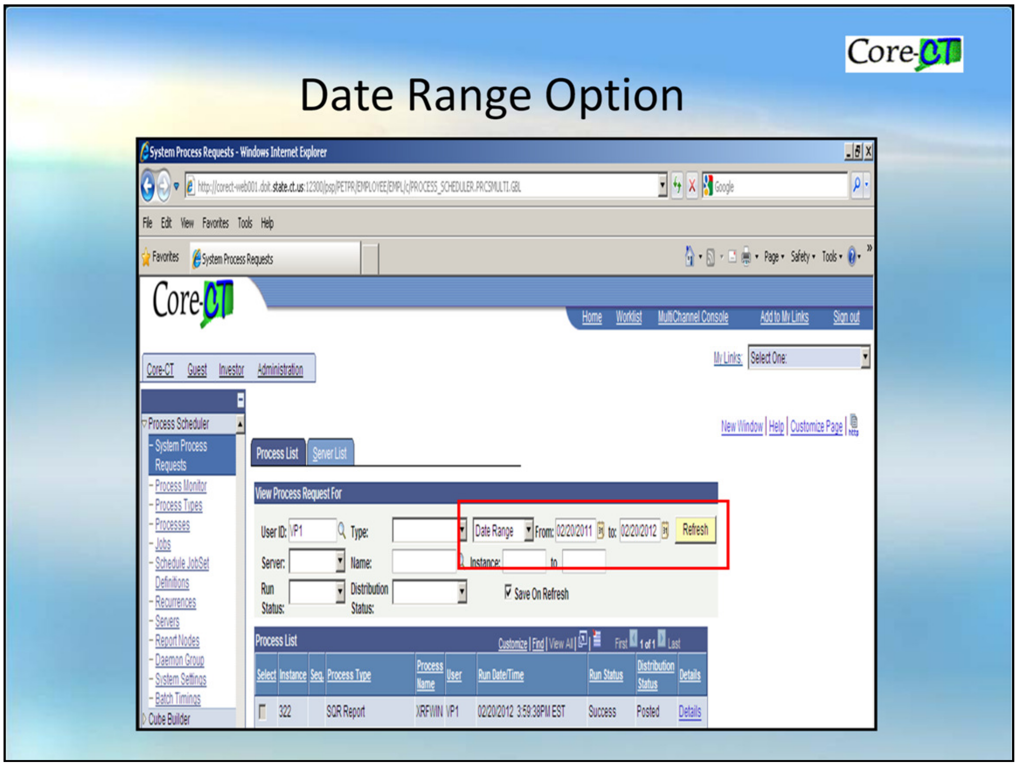


“Processing” Icon



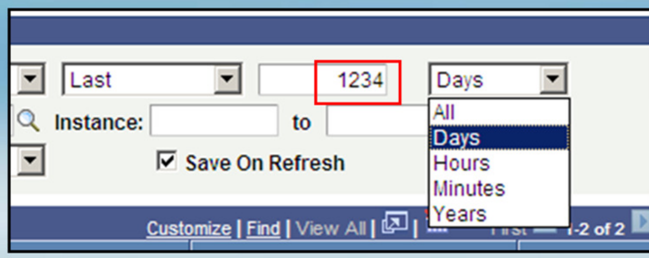


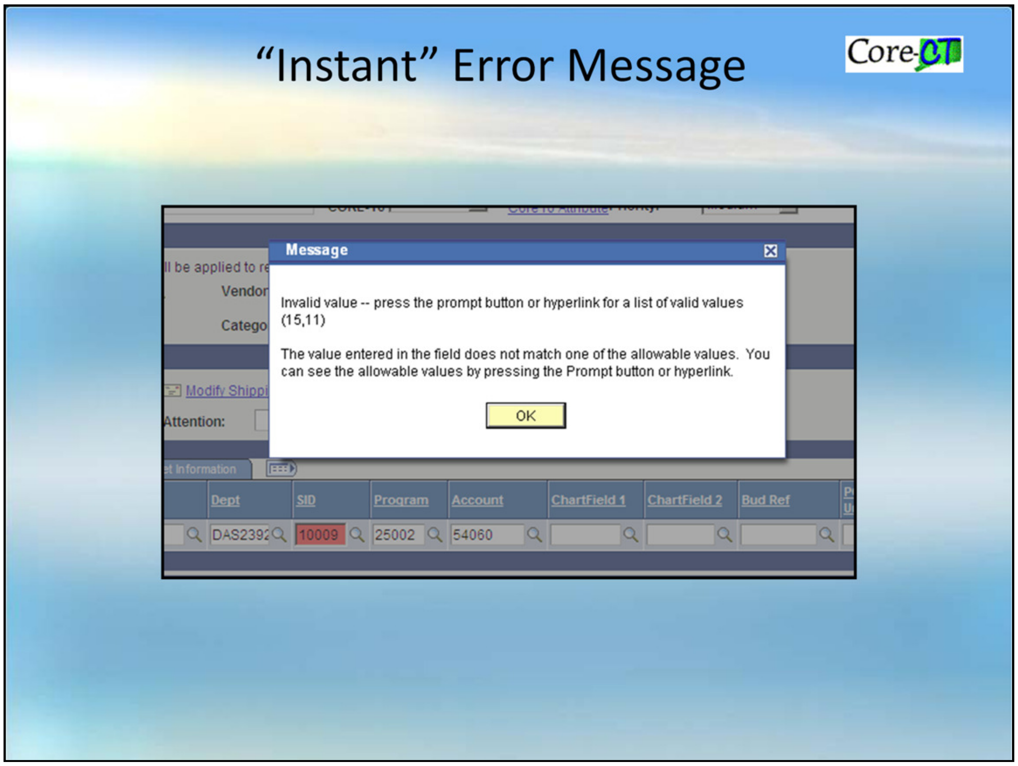




The Process Monitor and Report Manager pages have been updated to increase search and sorting functionality. The Process Monitor changes are shown below but the Report Manager page changes are similar.

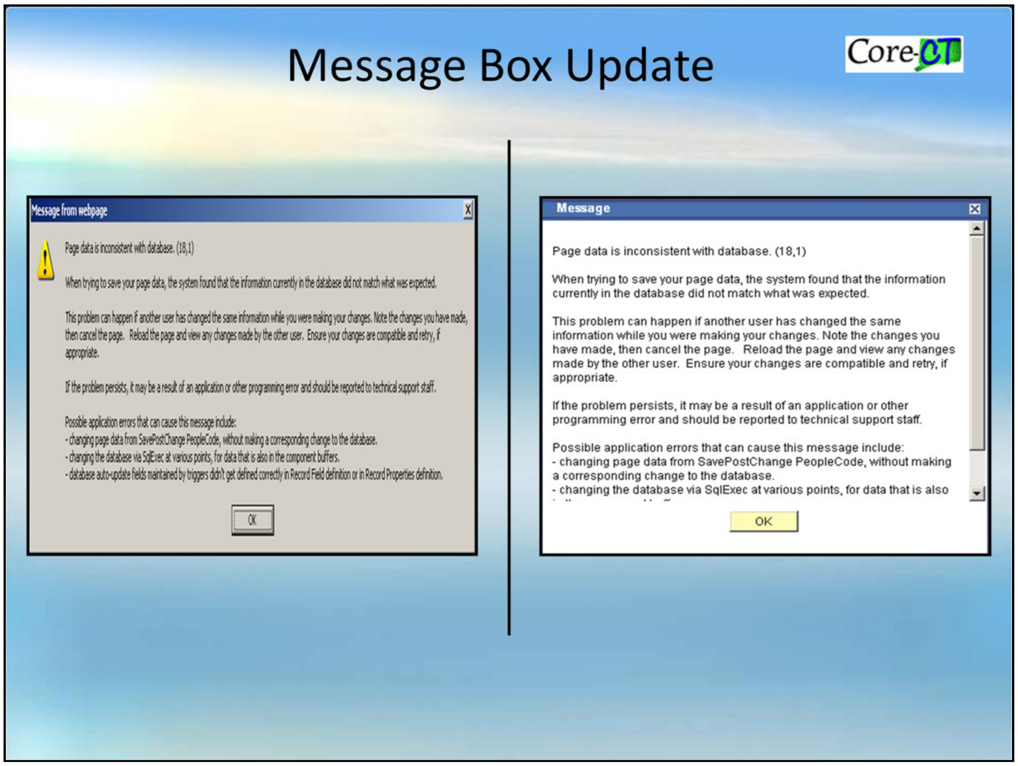
Four Digit "Last" Option



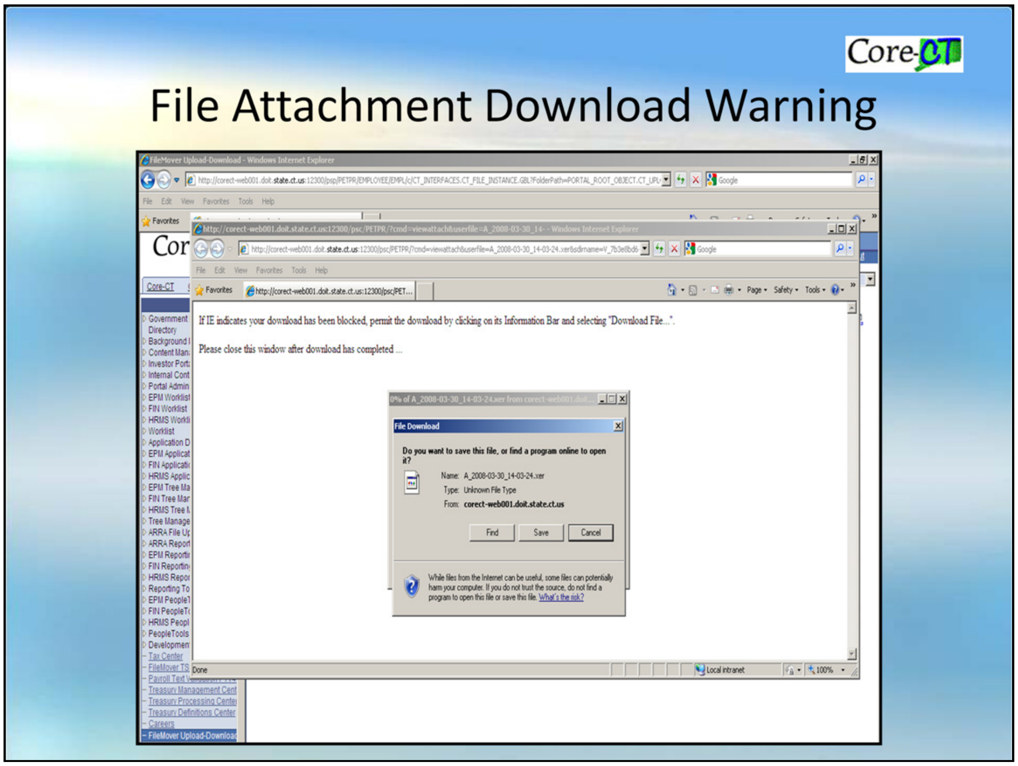


Where there is a red box denoting an error after saving, there is also an instant message with notification of no matching values.

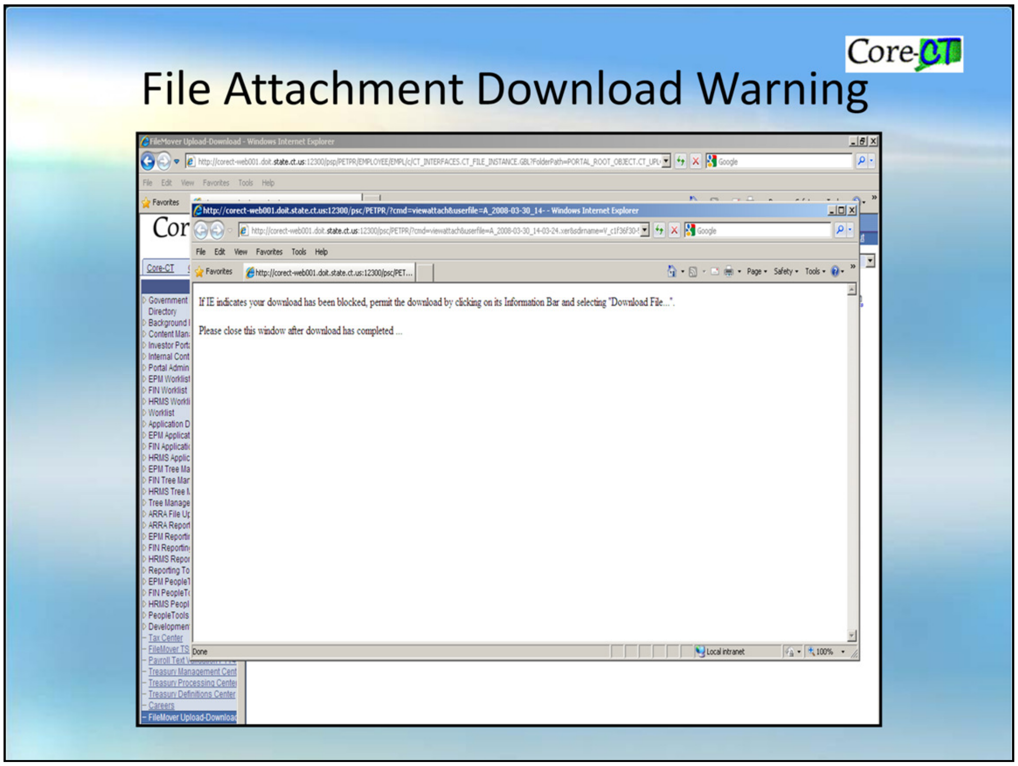
Please note: The red box will still appear on transactional processes.



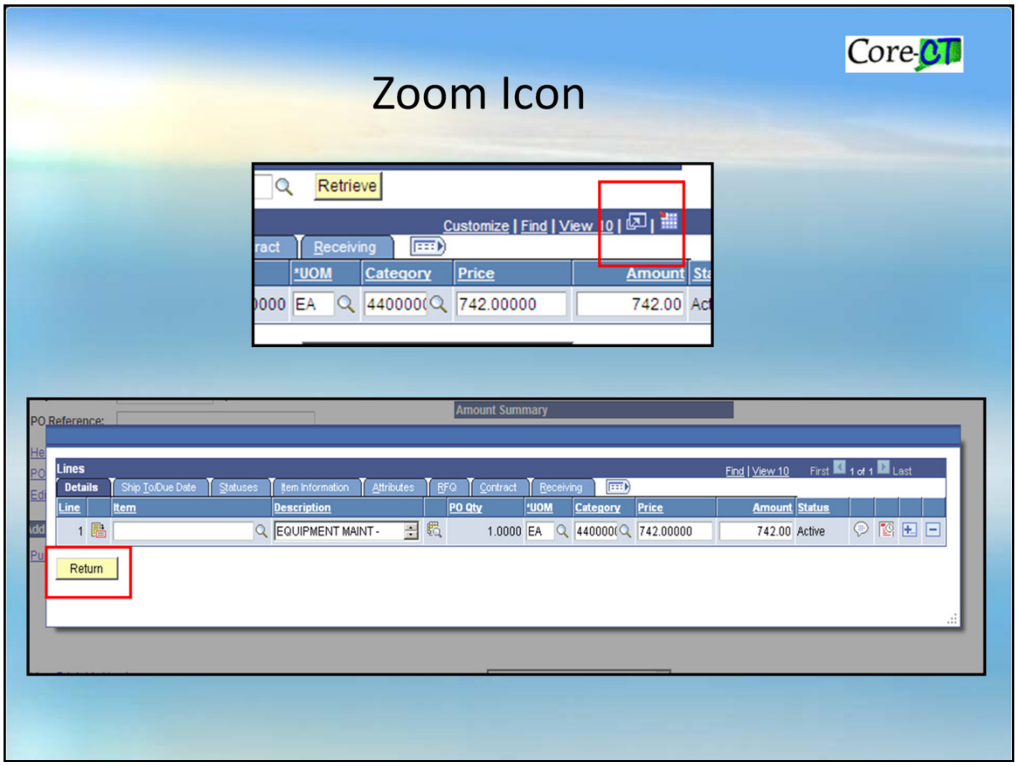
The format of the dialog boxes that alert users to messages, warnings, or errors, has been updated.



Security for file attachment downloads has been changed to follow changes that have been introduced with newer browsers with regards to limiting unwanted popup windows, commonly associated with spyware. When a file download is requested, PeopleSoft will open a new window and prompt the user where to Save the file. This update will be especially noticeable to users uploading and downloading files.

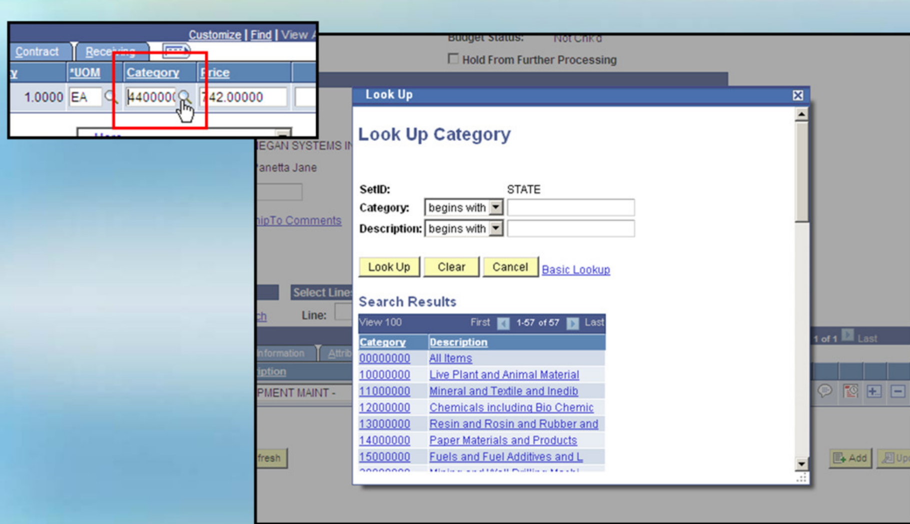


Once the file has been saved to a location specified by the user, the new background window, shown below, can be closed. This will return the user back to their original working window in the Core-CT application.

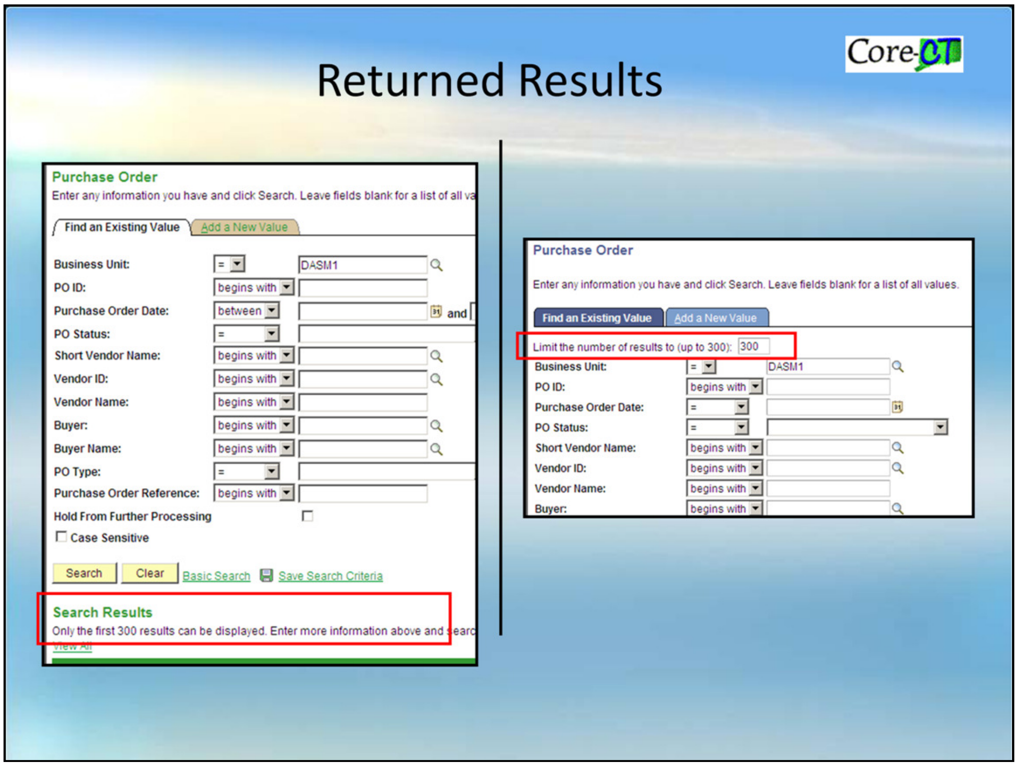


PeopleSoft Tools 8.51 delivers new functionality for working with grids in pages. Once the Zoom button is clicked, the grid contents will open within the existing browser window.

Lookup Page

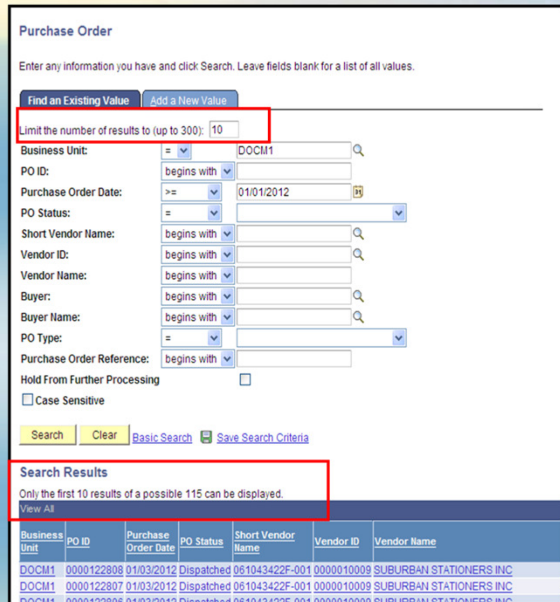


When clicking the magnifying glass to perform a lookup the appearance of the page has changed. The new functionality matches the appearance of the zoom grids from Item 7.

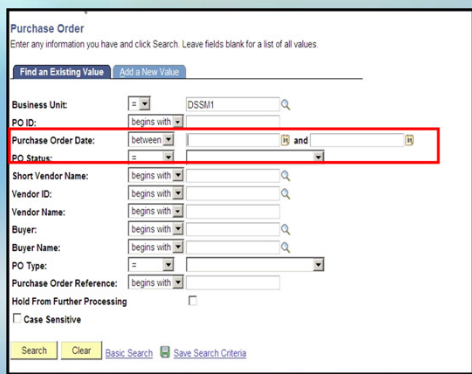


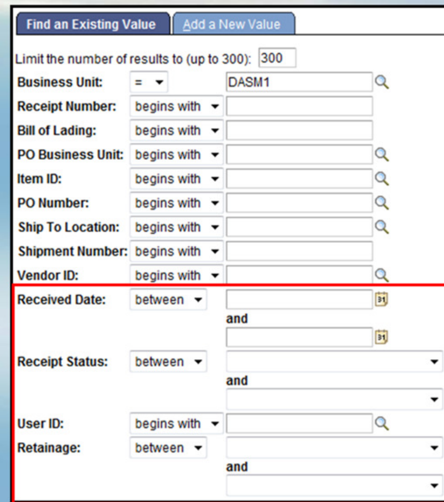
In the previous release users did not have the ability to limit the number of Search results that displayed. In the upgraded environment users can enter a number to limit the Search results.

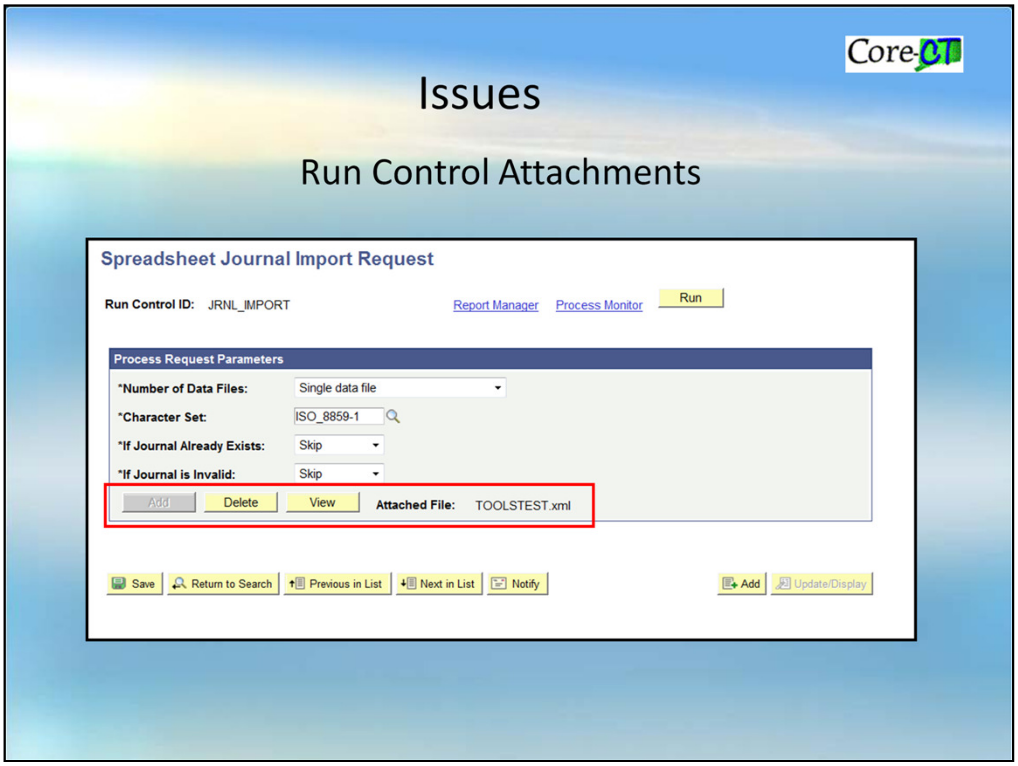
Returned Results



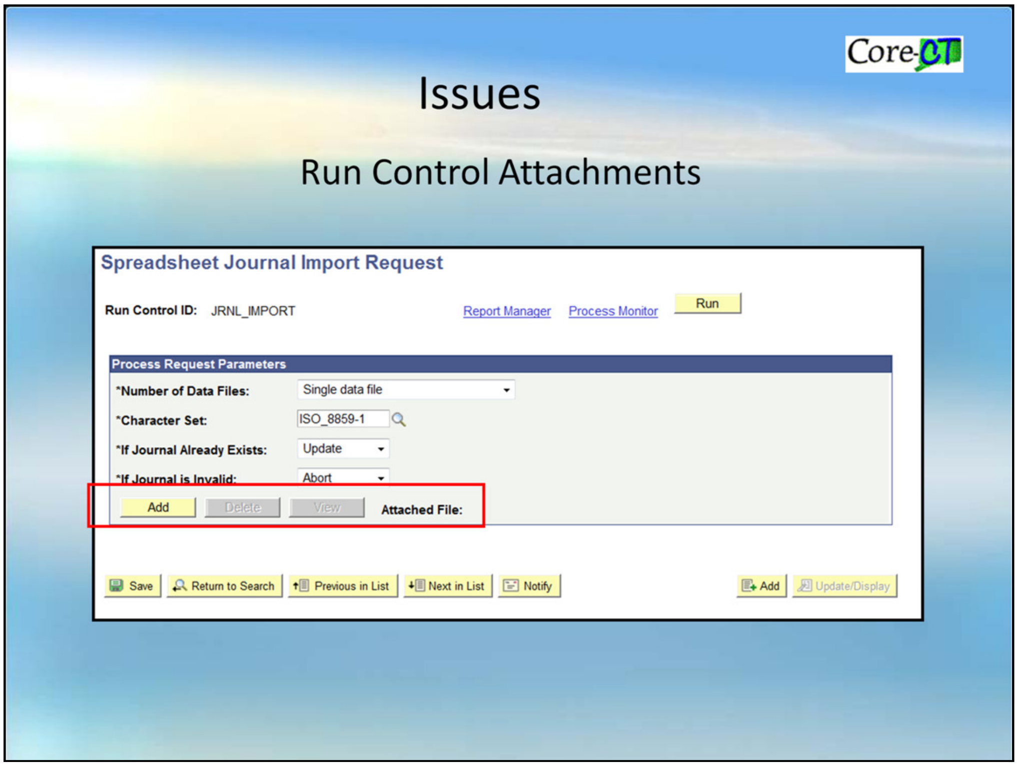
"Between" Search Criteria







As part of the PeopleTools upgrade any existing Run Controls that have file attachments, such as the GL Journal Spreadsheet Import, or the Budget Journal Import will have the file attachments removed. You will have to re-attach a file to the run control before running the process again.



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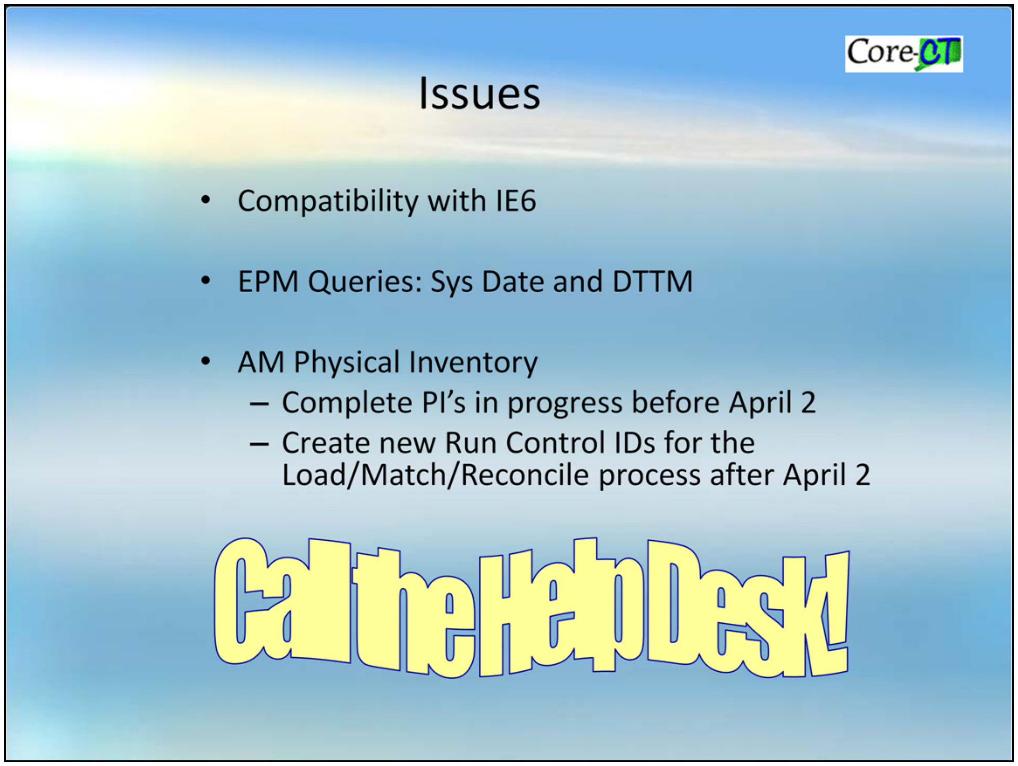


Internet Explorer 6 Users (DOC) may have compatibility issues with the upgrade. You will have inconsistent views. Contact your IT people to be upgraded to IE 7.

EPM Queries with Sys Dates may have issues due to new Oracle/PeopleSoft date format. If your EPM queries do nut run, call the Help Desk.

In progress Physical Inventory occurrences should be processed before the upgrade as new Run control IDs will have to be created for the Load/Match/Reconcile process after the upgrade.

Why are we upgrading to v9.1?

- The primary driver for the upgrade is the continuation of Oracle support.
- The upgrade provides an opportunity to leverage the PeopleSoft system including:
  - eApps
  - Retirement Payroll
  - ePro enhancements
  - Punchout
  - P-Card
  - Business Intelligence (BI) solution

Examples of Upgrade Enhancements

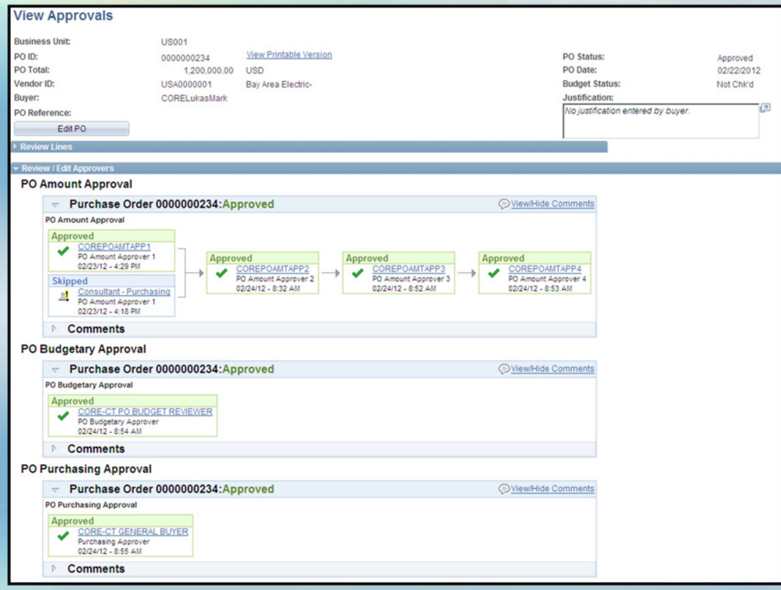
Core-CT

- **Punchout** capabilities to vendor website: be able to have the 'shopping cart' experience and return to Core-CT. The normal approval process would follow.
- **P-Card module**
  - Ability to denote on a PO/Requisition that it will be paid by P-Card payment
  - Vendor is identified and the detail of purchase is entered on the PO/Req
  - Approval is done through the system
  - Pre-encumbrance and encumbrance is reflected in budgets
- **Receiver Push** – Asset information will start when the receiver is entered. The asset is created within assets with a "pending' status. It becomes "in service" when it is paid.

Donalynn

Examples of Upgrade Enhancements

Approval Framework for POs and vouchers



Examples of Upgrade Enhancements

- **Electronic Invoicing**
  - **Working with a vendor to interface invoices into Core-CT**
  - **Agencies would approve invoices and vouchers could be created**
  - **Not the ability to fax or email invoices**
  - **Pilot a few vendors and a few agencies – Call Mark Aronowitz**

- **Attachments**
  - **COP9 Process – attach the COP9 documents to deposit ticket**
  - **Asset transfers – transfer paperwork attached**
  - **Retirement paperwork attached to assets**
  - **Journals – attach a spreadsheet or document**
  - ***Note: Checks and documents with bank account numbers should not be attached***

Examples of Upgrade Enhancements

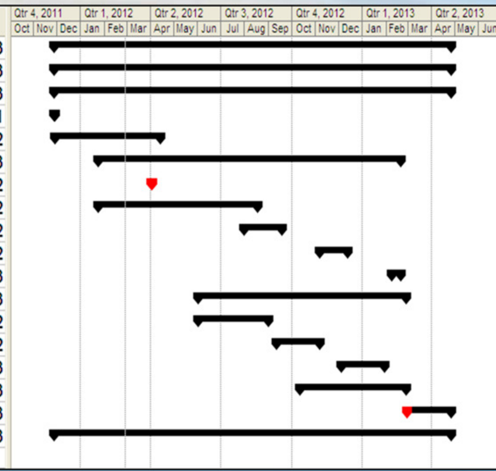
Core-CT

- Categorization thresholds for Assets
  - Assets will be categorized (based on their value) as capital, controllable, or expensed assets
- Other functionality
  - View a PO or bill without going to the process monitor
  - Paperless processing – create agency AP group email addresses to email bills between agencies
- Overall no major changes to standard transactions

Methodology & Timeline

Core-CT

Task Name	Finish
FMS Upgrade	Fri 4/26/13
Project Management & Quality Management	Fri 4/26/13
Organizational Readiness	Fri 4/26/13
Stage I - Initiation	Mon 11/28/11
Stage II - Planning & Analysis	Fri 4/13/12
Stage III - Upgrade & Integration	Tue 2/19/13
PeopleTools Go Live	Mon 4/2/12
Initial Pass	Fri 8/17/12
Test Move 1	Tue 9/18/12
Test Move 2	Wed 12/12/12
Test Move 3	Tue 2/19/13
Stage IV - Testing & Training	Tue 2/26/13
Initial Pass Testing	Fri 8/31/12
Test Move 1 Testing	Tue 11/6/12
Test Move 2 Testing	Wed 1/30/13
Training	Tue 2/26/13
Stage V - Deployment	Fri 4/26/13
Infrastructure & System Administration	Fri 4/26/13



Request from OSC-APD

Core-CT

- **Vendors You Currently Work With**
  - Request that they move to ACH (Automatic Clearing House) rather than receiving checks
  - Vendors will receive their money sooner and the check will not get lost, goes directly into their bank account
  - Saves money for the State
  - Not as likely to cancel or reissue payments

Any questions, please call Mark Aronowitz at 860-702-3399 or you can email him at mark.aronowitz@po.state.ct.us

Financials 9.1 Go Live: March 4, 2013